

Project Name:	<i>Tennessee Vital Records Electronic Death Registration System (EDRS) Training</i>
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**Electronic Death
Registration System (EDRS) Implementation
Training Plan and
Statement of Work**

Version 1.3

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1 – Executive Summary

The Tennessee Department of Health (TDH) is implementing the Electronic Death Registration System (EDRS) with the goal of having all end users trained to register deaths electronically in the VRISM system by June 19, 2017. This phase shall include funeral directors, medical examiners, local registrars, health care facilities and medical certifiers. Approximately 6,000 end users need training as part of the initial “Go Live” event beginning in June of 2017.

The vendor supplied trainer(s) shall address identified opportunities, adjust instruction and curriculum based on real-time quality assurance efforts performed by TDH staff or for provision of technical assistance based on individual trainee needs. A weekly report of number of trainees and sessions as well as a final report is required.

2 – Introduction

2.1 – Background

The purpose of the Vital Records Information Systems Management (VRISM) system is to automate the Department of Health Vital Records and Vital Statistics operations and replace numerous legacy systems. The VRISM system is Internet-based and provides access to real time birth, death, fetal death, marriage, divorce and induced termination of pregnancy data.

The system requirements are based upon National Center for Health Statistics (NCHS) data standards and specifications, the National Association for Public Health Statistics and Information Systems (NAPHSIS) standards, and the Public Health Information Network (PHIN) guidelines.

Currently, the State Office of Vital Records of the Tennessee Department of Health currently uses several systems in combination with manual processes to register, file, amend, store, retrieve, and print vital records and reports (births, deaths, marriages, divorces, fetal deaths, and induced terminations of pregnancy). Virtually all birth certificates are submitted as an electronic record with an accompanying paper copy from the birthing facilities in the state. All other record types (deaths, marriages, divorces, fetal deaths, and induced terminations of pregnancy) are submitted in paper form only, coded by staff of the Office of Vital Records, and then keyed by an off-site vendor. The paper documents of births, deaths, marriages, and divorces are scanned to image and stored for preservation, printing and issuance using a FileNet Imaging Services document capture system. Other documents, such as court orders or evidence for record amendments, are scanned and stored with the related certificate image. In the State Office of Vital Records copies of death, marriage and divorces as well as “long form” birth certificates are printed and issued from the stored images, not from paper.

System stakeholder groups include: a variety of State System users from the Central Office of the Department of Health, the Rural Regional Offices, the Metropolitan County Health

Department Offices, Funeral Directors, County Clerks, Court Clerks, Hospitals, Physicians, and Medical Examiners.

2.2 – Scope

This solicitation for services includes only Phase 2 (EDRS Training) of the training effort. Any description of Phase 1 (Issuance Training) or Phase 3 (EBRS Training) in this document is for reference purposes only. Any organization responding to this solicitation for services should not include anything for Phase 1 or 3. TDH may solicit for services for other phases at a later time.

During Phase 2, the target training audience in the 95 counties shall be end users in:

- Approximately 600 Funeral Homes (1 to 3 users per funeral home);
- 5 Regional Medical Examiner (ME) Offices (avg. of 3 per office);
- Approximately 600 Local Registrars;
- Approximately 300 licensed health care facilities (to include military, VA and hospice facilities) (avg. of 3 per facility); and
- Approximately 116 medical centers (as many as 2,600 medical certifiers)

Utilizing curriculum developed and approved by TDH (developed from provided technical manuals and previous training documents), not less than 5 weeks of training shall occur through instructor-led in-person training and/or webinar. It is envisioned that the selected vendor shall provide 80 training sessions over not less than 20 days of training and a minimum of two trainers with one being a senior level trainer with significant training experience (see 4.3 skills section below).

The vendor's trainer(s) must be prepared to attend the EDRS software developer supplied one week "Train-the-Trainer" session.

1. The Funeral Director (and staff) training shall be two (2) to four (4) hours and certifier (typically physicians and their staff) training shall be one (1) to two (2) hours. The first half of the period is content delivery and the second is hands on training.
2. Each session shall be supported with 1 Office of Vital Records and/or regional or local subject matter experts provided by TDH. As needed, this may transition to an opening welcome message by a senior TDH leader of not less than director level that is pre-recorded.
3. Training shall be conducted over at least 4 days per week.
 - (a) At least two locations shall receive on location in-person training each week in the following locations or a within a 50 mile radius: Memphis, Knoxville, Chattanooga, Jackson, Johnson City, Cookeville, Martin, and Savannah, Tennessee. TDH will schedule the facility for these sessions.
 - (b) Sessions may utilize webinar format for a portion of the sessions.
 - (c) As needed, TDH may require the vendor to conduct sessions in Nashville.
 - (d) As needed, TDH may require a portion of the sessions to be conducted after hours or on weekends.

2.3 – Data Security

Death record information is considered sensitive and is protected as confidential data.

The vendor supplied trainer shall be required to sign a confidentiality agreement prior to training.

2.4 – Timeline

Phase 2 shall include 20 full non-sequential training days over 5 weeks to execute training following the one- week “Train-the-Trainer” session. The vendor’s trainer(s) must be prepared to attend the EDRS software developer supplied “Train-the-Trainer” session as soon as ten calendar days following issuance of the Purchase Order. The vendor must be ready to begin training as soon as 30 days following issuance of the contract or within 10 days of attending the “Train-the-Trainer” session (whichever is sooner) and not later than June 19th, 2017.

3 – Training Requirements and Statement of Work

This Statement of Work is to procure training services for Phase 2 (EDRS Implementation Roll Out) training only. Subsequent requests shall follow for additional phases.

Criteria for Project Evaluation and Selection

The following criteria shall be used in assessing proposals:

Criteria	Compliance
Design of the project, with justification of its feasibility and the potential for wider cooperation amongst stakeholders	<input type="checkbox"/>
Clarity of the goals and importance and scope of the project impact	<input type="checkbox"/>
Effectiveness of suggested project management plan	<input type="checkbox"/>
The potential for a common benefit, resulting from the successful completion of the project	<input type="checkbox"/>
The degree of compliance with the objectives, goals and conditions of the project	<input type="checkbox"/>
Experience of partner organizations in the proposed field	<input type="checkbox"/>
Soundness and reasonableness of project budget	<input type="checkbox"/>
The degree to which the project is suited to the organizational framework	<input type="checkbox"/>

3.1 – Roles and Responsibilities

Following is a table containing the Roles and Responsibilities of the key players in this training effort. Organizations responding to this solicitation shall only perform the duties listed in the Responsibility column for the vendor supplied trainer role and all other duties outlined for the vendor supplied trainer in this document.

Role	Responsibility
Project Team Leader (State Provided)	<ol style="list-style-type: none"> 1. Develop and refine EDRS Training Plan. 2. Coordinate EDRS Training Plan execution. 3. Collaborate with VRISM vendor to ensure the vendor supplied trainer is able to provide a seamless training experience. 4. Supervise Project Team Staff. 5. Act as escalation point with any issues.
Project Team Staff (State Provided)	<ol style="list-style-type: none"> 1. Develop EDRS Training Plan. 2. Deliver EDRS Training Plan. 3. Develop and refine EDRS training materials with Trainer. 4. Supervise EDRS trainers. 5. Compile Training Evaluation Survey responses. 6. Participate in training as required. 7. Provide the vendor supplied trainer with compliance reports.
Trainer (Vendor Provided)	<ol style="list-style-type: none"> 1. Participate in Train-the-Trainer Sessions. 2. Develop curriculum and/or update EDRS training curriculum, based on feedback and training evaluation surveys, in consultation with Project Team Staff. 3. Provide assistance to users in order to connect with appropriate support and ensure communication. 4. Ensure to the maximum extent users have every effort to receive training and are knowable of resources after training is completed.
Help Desk (State Provided)	<ol style="list-style-type: none"> 1. Respond to support questions either over the phone or through email. 2. Maintain log of support calls.
Users (State Identified)	<ol style="list-style-type: none"> 1. Participate in training as required. 2. Utilize the EDRS fully after training.

3.2 – Training Sessions

During the critical “Go Live” event training ramp up beginning in June of 2017, the requirement for statewide training and the number of users shall exceed the training capacity of the department. . It is envisioned that the selected vendor shall provide 80 training sessions over not less than 20 days of training and a minimum of two trainers with one being a senior level trainer with significant training experience (see 4.3 skills section below).

The vendor’s trainer(s) must be prepared to attend the EDRS software developer supplied one week “Train-the-Trainer” session.

Training session shall be based on user roles. Each user role shall have a required training

curriculum, and each role may have overlapping curriculum elements

1. The Funeral Director (and staff) training shall be two (2) to four (4) hours and certifier (typically physicians and their staff) training shall be one (1) to two (2) hours. The first half of the period is content delivery and the second is
2. Each session shall be supported with 1 Office of Vital Records and/or regional or local subject matter experts provided by TDH. As needed, this may transition to an opening welcome message by a senior TDH leader of not less than director level that is pre-recorded.
3. Training shall be conducted over at least 4 days per week.
 - (a) At least two locations shall receive on location in-person training each week in the following locations or a within a 50 mile radius: Memphis, Knoxville, Chattanooga, Jackson, Johnson City, Cookeville, Martin, and Savannah, Tennessee. TDH will schedule the facility for these sessions.
 - (b) Sessions may utilize webinar format for a portion of the sessions.
 - (c) As needed, TDH may require the vendor to conduct sessions in Nashville.
 - (d) As needed, TDH may require a portion of the sessions to be conducted after hours or on weekends.

Training Audience	Session Information
Funeral Director (Primary Training audience)	<p>A funeral director, also known as a mortician or undertaker, is a professional involved in the business of funeral rites. These tasks often entail the embalming and burial or cremation of the dead, as well as the planning and arrangement of the actual funeral ceremony. In Tennessee, these professionals are often also small business owners and have a critical role in completing paperwork related to a death.</p> <p>Course options for funeral directors shall include in-person instructor led training or webinar. Webinar courses shall be limited to approximately 25 funeral homes to maintain a controlled environment. Both Central Office and Regional in-person courses shall be held at both onsite and offsite</p>
Certifiers /Other Users (Primary Training audience)	<p>In Tennessee, the person who provides cause of death information and signs a death certificate are most often credentialed health professionals such as Doctors. They have significant time commitments in their practice, which may be a stand-alone office or part of a medical center.</p> <p>Course options for Certifiers and Other Users shall include in-person instructor led training or webinar. Webinar courses shall be limited to approximately 25 to maintain a controlled environment. Both Central Office and Regional in-person courses shall be held at both onsite and offsite locations. Online self-learning tools shall also be available.</p>

Medical Examiners (ME) (State Trained)	<p>A county medical examiner is a physician appointed by law (Tenn. Code Ann. § 38-7-104) to determine the cause and manner of death of persons who dies under specific circumstances as defined by law. Law enforcement officials, physicians, hospitals, funeral directors, and others are required to report to the county medical examiner any death they think might fall under the jurisdiction of the county medical examiner.</p> <p>Course options for MEs shall include regional in-person instructor led training or webinar. Webinar courses shall be limited to approximately 10 MEs to maintain a controlled environment. Regional in-person courses shall be held at an offsite location. Online self-learning tools shall also be available.</p>
Local Registrar (State Trained)	<p>These are the staff of county health departments who act as the local representative of the Department of Health and also have a variety of other duties depending on their county. They typically assist with the filing and issuance of vital records.</p> <p>Local registrars' trainings shall all be regional in-person instructor led training at an offsite location. The maximum number expected at any training is approximately 20.</p>

4 – Training Materials and Requirements

4.1 – Training Materials

The vendor shall work with TDH staff to deliver the training materials. At a minimum, the vendor will receive a student manual and a training presentation. These training materials are the property of TDH and shall continue to be modified and updated at the TDH's discretion.

TDH shall ensure the vendor supplied trainer have access to the VRISM staging environment for use during training. For webinars, TDH shall provide training materials in .pdf format. The vendor supplied trainer shall be responsible for providing those .pdf documents to webinar participants at least one day in advance of training. Each training audience described in Section 3.3 shall have a specific curriculum tailored to their role in EDRS. For in-person instructor led courses, printed training materials shall be made available to the participants.

When a trainer schedules an in-person instructor led course, the vendor supplied trainer shall contact the Project Team Staff to determine the most cost effective and expeditious manner for printing the materials. These shall, with few exceptions, be printed by the State of Tennessee or at an authorized vendor.

4.2 – Hardware and Software

The trainer(s) shall receive training materials and a funeral directors guide during the "Train-the-Trainer" session in printed and electronic format. The trainer(s) shall be responsible for providing a laptop with capability to access the internet, a projector, projector replacement bulbs, and necessary cables and extension cords. The trainer(s)

shall also be responsible for providing a phone for their use in communicating with TDH, end users, and other stakeholders.

4.3 – Skills

The trainer(s) shall meet the following qualifications:

1. At least five years of training curriculum development and delivery including both web-based and instructor led curriculum;
2. At least two years of training delivery experience within information technology projects or delivery of training via technology (using Adobe, Cisco, etc.); and
3. Experience in broad statewide or regional training delivery for technology solutions.

Each trainer shall also possess the ability to travel to locations throughout Tennessee, including some areas not served by public transportation. Overnight travel shall be required at the expense of the vendor.

5 – Glossary of Terms

To follow is a Glossary of Terms used in this document or that shall be likely used by TDH personnel.

Term	Definition
AIRS	Automated Index Retrieval System – Legacy System-This system searches for birth, death, marriage, and divorce certificates that match specified input variables. Birth certification may be printed if all essential items are present for the required record.
EDRS	Electronic Death Registration System – An on-line web-based application for the electronic filing of death records.
EVVE	The EVVE system, owned and operated by NAPHSIS, allows immediate confirmation of the legitimacy of a US birth certificate presented by an applicant to a government office anywhere in the nation. Authorized EVVE users send an electronic query to any participating vital records jurisdiction to either verify the contents of a paper birth certificate or to request an electronic certification instead of the paper birth certificate. An electronic response from the participating vital records jurisdiction either verifies or denies the match with the official records. The EVVE system shall also flag responses in which the person matched is actually deceased, an important step that prevents fraud.

JACADA	Vendor name for Legacy System- The system allows a request to the Vital Records Office to be captured and maintained for a period of six months past the date completed. Fees received are noted and balanced for each request. On-line information allows staff to respond to public inquiry. Management reports on fees and activities are produced. Correspondence is generated and recorded for specific cases. It interacts with the AIRS System to produce searches of birth, death, marriage, and divorce records and certificates of birth records. It interfaces with the TVRS (Image Processing System) to search for requested records.
MANTECH	Software Vendor for EDRS- ManTech has been providing Vital Records solutions for 15 years and has an experienced team that understands the Vital Records business. ManTech has a combined experience of more than 50 years in the Vital Records solutions market, and the Vital Records team has participated in multiple Vital Records implementations.
ME	Medical Examiner
NAPHSIS	<p>NAPHSIS is the national nonprofit organization representing the state vital records and public health statistics offices in the United States. Formed in 1933, NAPHSIS brings together more than 250 public health professionals from each state, the five territories, New York City, and the District of Columbia.</p> <p>Working with federal partners such as the Centers for Disease Control and Prevention (CDC), the CDC's National Center for Health Statistics (NCHS), the Social Security Administration, the Department of State, the Department of Homeland Security, and the Office of Personnel Management, NAPHSIS operates electronic systems for vital records offices.</p> <p>NAPHSIS also works with its members, its corporate partners, and NCHS to support the development and use of electronic birth and death registration systems.</p>

STEVE	<p>Births and deaths often occur away from a person's home state. States report public health statistics for all residents, and the federal government provides statistics for the entire nation. For these reasons, vital records jurisdictions must be able to share data with one another, the National Center for Health Statistics, and other authorized data partners.</p> <p>To accomplish this important public health service, NAPHSIS developed the State and Territorial Exchange of Vital Events (STEVE) system. Using STEVE, vital records jurisdictions:</p> <ul style="list-style-type: none"> • Send statistical data to the National Center for Health Statistics for inclusion in the National Vital Statistics System, • Send vital records that pertain to residents in other jurisdictions so the home state's reports include these important data, • Send death information to the jurisdiction of birth so that birth certificates can be flagged as 'deceased,' an important step in preventing fraud and identity theft, • Provide data to authorized data partners for use in authorized public health and administrative purposes.
TDH	Tennessee Department of Health
TVRS	TN Office of VR Document Management System – Legacy System-This is an image processing system used to store, maintain and retrieve the Tennessee vital records (birth, death, marriage and divorce certificates) maintained by the Department of Health. TVRS interfaces with the Vital Records Tracking system and the Automated Index Retrieval System (AIRS) to allow for case entry and closure on Tracking; index searching on AIRS; and retrieval, printing and other maintenance-type activities on TVRS.
VitalChek	Vendor for Funds Processing Service- The system allows the input of orders for vital records services that are received by phone, fax, or Internet and shall be charged to a credit card, and enables overnight delivery service when requested.
VRISM	Vital Records Information Systems Management – The database application used to register death records electronically. This system allows for electronic communication between the Tennessee Office of Vital Records and those partners who help to register vital events that occur in Tennessee. The new system shall be a web-based, electronic system and shall replace the predominantly manual, paper-based process currently in use.
VRVweb®	The MANTECH application that of which VRISM and EDRS are an implementation. Referred to as “VRISM” by most TDH personnel.